

Third Party Administrator (Representative/Provider) access to *UI eServices for Employers*

Through eServices, employers can file and pay their UI Quarterly Reports, update demographic information, and much more. Third Party Administrator's (TPA) may also gain access to their clients UI Tax Accounts, if we obtain authorization from each client. Please choose the access level appropriate for each of your clients.

UI eServices for Employers has several levels of access:

- View Only
 - View reports, payments, and limited demographic information.
- Pay Only
 - View reports, payments, and limited demographic information. Plus the ability to make ACH Debit or Credit Card Payments and/or print payment vouchers.
- File Only
 - View reports, payments, and limited demographic information. Plus the ability to file and print quarterly UI reports.
- File & Pay
 - View reports, payments, and limited demographic information. Plus the ability to both file and pay quarterly UI reports.
- Full Access
 - Includes the authority to update demographics (including owner/officer information), view correspondence (including benefit charge notices), and submit a variety of requests (such as appeals, payment plans, and more).

We must have a signed authorization form on file for each of your clients. In an attempt to make this process a little smoother, we will accept signed IRS form 8655 with line 19 checked or utilize the MT UI Contributions Authorization form found here:

<http://uid.dli.mt.gov/Portals/55/Documents/eServices/dli-uid-es010.pdf>

We also offer TPAs rate exchange and bulk filing options within eServices:

- Fiscal Rate Exchange
 - Does not give direct access to any client account information, simply allows the user to upload a client list and retrieve UI Tax rates for each client. Does require a MOU agreement to be in place. See the Fiscal Rate Exchange documentation at <http://uid.dli.mt.gov/Portals/55/Documents/eServices/dli-uid-es012.pdf> for more information.
- Bulk Filing
 - Does not give direct access to any client account information, simply allows the user to utilize eServices to upload ICESA or FSET files to submit tax, wage and payment information for numerous clients at one time.
Please see our Montana UI Contributions eFiling Handbook at <http://uid.dli.mt.gov/Portals/55/Documents/Contributions-Bureau/dli-uid-ui009.pdf> for more information regarding the transmission options available. In order to discuss any

issues that may occur with specific records submitted via a bulk file, it is preferred that we have a MOU in place with all bulk filers.

Due to the limited amount of information returned to participants in the Fiscal Rate Exchange, signed authorization forms from each client will not be required. However, we will require your organization to enter into a Memorandum of Understanding (MOU) with the UI Contributions Bureau, confirming you do have the authority to retrieve the rate for your clients.

Download the MOU here: <http://uid.dli.mt.gov/Portals/55/Documents/eServices/dli-uid-es024.docx>

If TPA's participating in the Fiscal Rate Exchange & Bulk Filing options, wish to receive additional access to their clients information, they must submit a signed authorization form for said client(s).

To expedite this process, authorization forms and MOUs can be mailed, faxed, or securely emailed through the FTP Secure File Transfer Service in bulk to:

- **Mail:**

Attention: UI eServices Support
UI Contributions Bureau
PO Box 6339
Helena MT 59604-6339

- **Fax:**

Attention: UI eServices Support
(406) 444-0629

- **FTP Secure File Transfer Service:**

- To send an FTP Secure File Transfer, a valid ePass account must be established. This can be done by going to this website: <https://transfer.mt.gov/> and either creating a new account or logging into an existing ePass account.
- Once you are logged in, click on the "Send a new file(s)" button.
- "Click to Upload" and select the file that needs to be sent.
- Click the "Continue" button.
- Click on the "State Employee or ePass Montana Customer" link.
- Type uieservices@mt.gov in the "To" box
- In the box marked "Enter a Message for the Recipient(s)", enter a **contact name**, a **contact phone number**, and a **valid e-mail** address so we can send a response back concerning receipt of the file.
- Click the "Send" button. This will send the file.

NOTE: ePass and the Secure File Transfer Service offered by ePass is not a system supported by the Department of Labor and Industry, it is a service offered by the State of Montana. If you have any issues using this system (i.e. cannot remember login/password information, cannot register, system doesn't seem to be working properly) please call the ePass Support Center at (406) 449-3468 or go to this website <https://app.mt.gov/contactus/index.html>.

Once the authorization forms or MOU are received, we will work with you to set up an eServices account (may require you to be established as a customer if your organization does not already conduct business in Montana). If you are requesting access to individual employer account information through eServices, we'll attach the clients to your established web logon and notify you as soon as you can see

your client accounts on eServices. If you have submitted an MOU, we'll notify you as soon as you can run a Fiscal Rate Exchange file.

Questions?

Please contact UI eServices Support at uieservices@mt.gov or call (406) 444-6963 or (406) 444-1874.